CUSTOMER SERVICE
MODIFY WORK TASKS: ASSIGN RESOURCE(S)
Provides guidance for assigning resources to a Facilities Connect Work Task.

▼ GETTING STARTED
This job aid begins on the Tasks tab. For more information on navigating to the Tasks tab, please refer to the Access + Navigation: Tasks Tab job guide.

DIRECTIONS:

1. From the Tasks tab, locate the Manage Tasks section:
   
   1. Click on the All Tasks menu option.

2. Upon clicking, the All Tasks screen will open.
   
   2a. Use the available Search Fields (beneath column headers) to locate the Work Task you wish to view.

   2b. Enter keywords and press the Enter key to narrow your search.

   2c. Once located, click anywhere on the Work Task Record to open.
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DIRECTIONS:

3 To Assign Resources on the work task:

3a Click on the Resources tab.

3b Next, locate and click on the Find People option.

The Find People pop-up window will appear:

3c Click on the Related Reports drop down menu arrow and select the All People option to search all available Resources.

3d Mark the Checkbox beside the name of the individual(s) you wish to assign as a Resource.

3e Then, click on the Ok button to assign. Repeat 3c through 3e as necessary for multiple individuals.
DIRECTIONS:

3. Click on the Save button to confirm the assignment(s).

TIP & TRICKS

Utilize the column headers and search bars to narrow your search. Searching by first and last name, sorted by All People is most effective way to locate a resource.